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AUTHOR	Frazier, Billie H.
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ABSTRACT

This document contains a brief bibliography of peer-reviewed literature, with abstracts, on living arrangements in later life. It is one of 12 bibliographies on aging prepared by the National Agricultural Library for its "Pathfinders" series of publications. Topics covered by the other 11 bibliographies include aging parents, adult children, dementia and Alzheimer's disease in the elderly (written for educators), dementia and Alzheimer's disease in the elderly (written for consumers), family caregiving, family support networks, grandparenting, humor in later life, intergenerational relationships, pets and the elderly, and sibling relationships in adulthood. This bibliography on living arrangements in later life contains citations for 33 books and articles for researchers and educators on general living arrangements, accessory apartments, ECHO (Elder Cottage Housing Opportunity) housing, home equity conversion, and public policy; and citations for 12 books and articles for consumers. It concludes with a list of organizations that readers may contact for further assistance. (NB)

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Pathfinder

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FEBRUARY 1990

LIVING ARRANGEMENTS IN LATER LIFE

PREPARED BY BILLIE H. FRAZIER, Ph.D., CFLE**

This PATHFINDER has been prepared to help researchers, educators and consumers better understand some of the family, community, and societal issues and living arrangement preferences among elderly persons. Reviews on accessory apartments, ECHO housing, home equity conversion, and public policy are included.

RESEARCHER/EDUCATOR

General

Aging at Home--How the Elderly Adjust Their Housing Without Moving, Raymond J. Struyk and Harold M. Katsura. New York, NY: The Hawthorn Press, 1988.

Findings of this research project relate to the causes and incidence of in-home housing adjustments. Four types of adjustments are analyzed: (1) changing the use of rooms; (2) modifying the home to facilitate use by persons with physical impairments; (3) taking in roomers or boarders; and (4) adjusting the amount of repairs and improvements which are undertaken.

CG 022498

This PATHFINDER lists significant resources that are judged to be accurate, readable and available. Opinions expressed in the publication do not reflect views of the United States Department of Agriculture.

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GPO 907-725

A Place to Grow Old, Stephen M. Golant. New York, NY: Columbia University Press, 1984.

This research had two major tasks: first, to describe the extent to which old persons dissimilarly assessed or experienced the consequences of living in their current residential setting; second, to distinguish the differences in their personal characteristics that accounted for their variable environmental responses. The primary motivation of the author is to elucidate the nature and problems of aging and old age. The author questions whether the individual-environmental relationships discovered are really a product of old age or simply a reflection of individual differences typically found among younger populations. Its findings have implications for the formulation of public policies and planning strategies.

"Community Resistance to Planned Housing for the Elderly: Ageism or General Antipathy to Group Housing?," Wiley P. Mangum. The Gerontologist, 28(3):325-329, 1988.

Community resistance to elderly housing is studied through a mail survey of two suburban communities. All group housing is found to be objectionable but the least objectionable are one-story apartments, shared housing, and multi-story apartments for the elderly, in that order. Antipathy to group housing, in general, is a far more important predictor of antipathy to housing for the elderly than ageism.

"Elderly Persons Living Alone: The Effect of Community Context on Living Arrangements," Lauren J. Krivo and Jan E. Mutchler. Journal of Gerontology, 44(2):S54-S62, 1989.

Many policies are being advanced to deal with the aging population who desire an independent lifestyle. In this study, the authors use the community context to explain intermetropolitan variation in rates of elderly persons who live alone. Three critical community resources influence the rate of living alone: demographic and normative environment, economic affordability, and community social services.

The Environment for Aging, Russell A. Ward, Mark La Gory, and Susan R. Sherman. Tuscaloosa, AL: The University of Alabama Press, 1988.

The research explores the influence of environment, both physical and social, on the lives of older individuals. Several aspects of this environment are highlighted: (1) residential location and neighborhood context, (2) informal networks and social supports, and (3) images of aging as they are reflected in attitudes toward aging.

"Future Living Environments--Forecasts and Issues," Betty Jo White, Mary H. Yearns, Glenda Pifer, and Roberta Null, Journal of Home Economics, 81(1): 4-8, Spring 1989.

A wide variety of housing alternatives will be needed to permit older Americans to live independently as long as physically and financially possible, and to avoid making significant changes in lifestyles or living arrangements. Most of the elderly will choose to "age in place" in their existing home and long-time community. Wide adoption of the universal or lifespan design concept would accommodate life-cycle changes and disabilities without major or expensive modifications.

"Housing for an Aging Society--How Relevant is Age?," Barbara Gunn. Housing and Society, 15(3): 246-253, 1988.

Many older individuals want to remain in their own homes as long as possible. Thus, it makes sense to have their homes "age proof" from the beginning; that is, suitable for their changing needs and capabilities. Research has demonstrated the feasibility of incorporating desirable housing features for individuals with temporary or permanent disabilities into housing for individuals of all ages. This author asks housing specialists to consider the potential benefits of this approach.

"Housing for the Future," Charles Fahey. Journal of Housing for the Elderly, 5(1):3-5, 1988.

Pertinent questions concerning lifestyles and housing of older adults include: Who will bear the economic and psychological burden? How will the formal support system be financed? What is the role of the individual, the family, private insurance, and social insurance? How can neighborhoods be built so persons can live with intergenerational solidarity that involves exchanges of services between the generations? How can caregivers be best supported? The author states that the creation of environments which stimulate persons to live life to the fullest throughout life need to be a principal value guiding the development of housing for the future.

"Intergenerational Transfers: Aging Parents Living with Adult Children and Vice Versa," G. Sundstrom, G. Samuelsson and I. Sjoberg. Zeitschrift fur Gerontologie, 22(2):112-117, 1989.

This study analyzes co-residence patterns between generations in the Nordic countries. Results indicate that never married men, especially those with various handicaps, more often live with their aging parents than do others. Parents remain important for their offspring whether they live together--something that few people want in either generation--or not.

"Interpersonal Understanding in the Elderly: The Influence of Age-Integrated and Age-Segregated Housing," Frances Cohen, David J. Bearison and Charlotte Mullet. Research on Aging, 9(1):79-100, March 1987.

This study examines the effects of self-selected age-segregated and age-integrated housing conditions on levels of interpersonal understanding. The main finding is that subjects from age-integrated housing have higher levels of interpersonal understanding than subjects from age-segregated housing.

New Design for Old: Function, Style and Older People, Eric Midwinter. London: Center for Policy on Ageing, 1988.

Results of a workshop on design for older people are reported. Designers, aging experts, and entrepreneurs discuss the design of products that the aged need and want to purchase. A literature review includes: designs for the elderly, discussions on the need for planning environments, and products which could be used across the life span.

"One-Story Living," David W.E. Smith. American Demographics, 11(6):36-37, 1989.

This article points out that steps are the single most difficult barrier for the elderly to overcome as they desire to maintain independence in their own homes. It is suggested that the housing industry needs to address the idea of single family houses with no stairs as the most appropriate way for elders to remain independent.

Planning Your Retirement Housing, Michael Sumichrast, Ronald G. Shafer, and Marika Sumichrast. Glenview, IL: Scott Foresman and Company, 1984.

This is a survey of special features older people would like in retirement housing. In many respects, features desired by older individuals may also be features desired by younger persons. Examples include more storage, and more convenient storage, and one "great room" that combines dining, family, and living rooms.

"Preferences of Older Adults and Experts for Physical and Architectural Features of Group Living Facilities," Penny L. Brennan, Rudolf H. Moos and Sonne Lemke. The Gerontologist, 28(1):84-90, 1988.

The Physical and Architectural Features Checklist assesses older adults' preferences for physical design characteristics of group living facilities. In this study, congregate apartment and older community residents express similar physical design preferences, but experts prefer more physical features than older adults. The physical design preferences of older adults may help guide planning of group living facilities.

Shared Housing, Leo L. Cram. Columbia,MO: Missouri Gerontology Institute, Missouri Cooperative Extension Service, 1985.

A growing number of older persons are finding that shared housing is a much more desirable alternative than living alone,living with children, living in a senior citizen high rise apartment building, or any other alternatives. The author presents a definition of shared housing along with examples of models. Discussions on what communities can gain from shared housing, steps in launching a community program, and barriers which can impede results are also discussed.

"Six Ways to Age," James Gollub and Harold Javits. American Demographics, 11(6):28-35, 1989.

Six distinct psychographic profiles emerge from results of a survey of 3600 persons aged 55 and older. Individuals have preferences for how they want to live, but, in general, the trend is for "staying in place." Moves into life-care and congregate housing facilities are delayed for as long as possible.

The Social and Built Environment in an Older Society. Committee on an Aging Society. Washington, DC: National Academy Press, 1988.

This book identifies complex societal issues that need attention. Papers include "Social and Physical Environments for the Vulnerable Aged," "Current and Emerging Issues in Housing Environments for the Elderly," "Design Problems in Enhancing Productivity," "Independence in Housing for the Elderly," and "The Relation of Housing and Living Arrangements to the Productivity of Older People."

"Subjective Housing Assessments by the Elderly: A Critical Information Source for Planning and Program Evaluation," Stephen M. Golant. The Gerontologist, 26(2):122-127, 1986.

The author contends that a comprehensive analysis of an older person's housing situation must include both objective and subjective methods. The subjective indicators, unavailable through objective measurement, provide essential insights in effective planning and program evaluation.

Technology and Aging in America, U.S. Congress, Office of Technology Assessment, OTA-BA-264. Washington, DC: Superintendents of Documents, June 1985.

This assessment was requested by the Senate Special Committee on Aging and the House Select Committee on Aging, The study focuses on the functional status of the elderly and ways in which technology can assist them to maintain their independence and enhance their quality of life. Special attention is given to the potential impact of telecommunications in the home and community in promoting self-health care among the elderly. The housing and living environment of the elderly are also discussed. Telecommunications are making the "electronic cottage" a reality, and older persons may be able to take advantage of emerging opportunities for home-based work arrangements.

Understanding Senior Housing, Washington, DC: Consumer Affairs Section, Program Department, American Association of Retired Persons, 1987.

In 1986, AARP was responsible for a nationwide survey of adults age 60 and over. The focus was on housing needs, concerns, and preferences. A task force of researchers, housing providers, and older consumers was convened to discuss AARP's proposed housing survey. This document provides a summary report of this survey. It examined the total aging sample and the subgroups of the population so that differences among these groups could be better understood, and policies and programs could be better targeted to individual needs.

ACCESSORY APARTMENTS

Accessory Apartments, Leo L. Cram. Columbia, MO: Missouri Gerontology Institute, Missouri Cooperative Extension Service, 1987.

An accessory apartment is a self-contained second living unit built into, or attached to, an existing single family dwelling. They are frequently referred to as in-law flats, efficiency apartments, secondary units, or single-family conversions. The author discusses models of accessory apartments, common features of the models, implications for the older home owner, steps in launching an accessory apartment project, and additional sources of information.

Accessory Apartments and Single-Family Housing, Martin Gellen. New Brunswick, NJ: Center for Urban Policy Research, 1985.

This book examines accessory apartment conversions as an emerging trend in American housing. It also assesses their potential as an instrument of local and national housing policy.

ECHO HOUSING

ECHO Housing: A Review of Zoning Issues and Other Considerations, Patrick H. Hare and Linda E. Hollis. Washington, DC:American Association of Retired Persons, 1983.

The opportunity for older persons and their families to take advantage of ECHO (Elder Cottage Housing Opportunity) housing, a small detached living unit adjacent to a relative's home, is thwarted in many jurisdictions by zoning. The purpose of this booklet is to educate families and public officials about ECHO housing's potential for responding to the needs of the diverse populations of older persons. ECHO housing's promise lies in the fact that it gives older persons and their families wide latitude in providing safe, and economic housing.

ECHO Housing: Recommended Construction and Installation Standards, Ronald L. Mace and Ruth Hall Phillips. Washington, DC: American Association of Retired Persons, 1984.

This publication is intended for use by manufacturers, lending institutions, elected officials, barrier free advocates, and consumers. It gives manufacturers and builders guidelines for constructing good quality, low cost housing that meets the needs of the users.

Legal Issues in Elder Cottage Housing Opportunity (ECHO): Restrictions on Manufactured Housing, Helen E. Hedges. Washington, DC: American Association of Retired Persons, 1982.

This review is one of a series of resources available to persons concerned with legal issues of innovative living arrangements for older persons. Topics include legal issues in: (1) house sharing and what is a family; (2) accessory apartments: zoning and covenants restricting land to residential uses; and (3) elder cottage housing opportunity: restrictions on manufactured housing.

Proceedings of ECHO Housing in the Ozarks, Leo L. Cram, Norm Flax, and Charles M. Joiner. Columbia, MO: Missouri Gerontology Institute, Missouri Cooperative Extension Service, 1987.

A concentrated one day workshop focused on ECHO housing, one of the new and more promising alternative living arrangements for seniors. The experts who led the workshop expressed much optimism about this housing concept which potentially can meet the needs of many older adults.

HOME EQUITY CONVERSION

Advising Older Homeowners on Home Equity Conversion: A Guide for Attorneys, Kent M. Schimeall and Trudy A. Ernst. Washington, DC: American Association of Retired Persons, 1986.

This manual provides the three most common methods of home equity conversion and raises significant issues related to each method. It is for attorneys who represent the elderly rather than for attorneys who represent lenders or investors.

Home Equity Conversion for the Elderly: An Analysis for Lenders, Maurice Weinrobe. Washington, DC: American Association of Retired Persons, 1986.

This manual provides an introduction to home equity conversion and the types of reverse mortgages available. An analysis of home equity conversion instruments is provided, with risks and uncertainties associated with reverse mortgage lending. The benefits of home equity conversion to the lender and borrower and the future of reverse mortgage lending are discussed.

A Home Equity Conversion Guide for Financial Advisors: The Unique Asset, H. David Raper. Washington, DC: American Association of Retired Persons, 1986.

This manual for financial advisors provides information on: equity conversion: orderly disaccumulation; equity conversion through debt: reverse mortgages; life tenure reverse mortgages; and equity conversion through sale. A section on advising the homeowner is included.

PUBLIC POLICY

Future U.S. Housing Policy: Meeting the Demographic Challenge, Raymond J. Struyk, Margery A. Turner, and Makiko Ueno. Washington, DC: The Urban Institute Press, July 1988.

This paper explores the changes in housing demand and housing problems that are likely to result from the demographic transformation of our society. The ability of existing housing policies to respond to these changes is discussed. The authors predict that, in the decades ahead, demand will increase dramatically for smaller housing units that offer a richer array of ancillary services.

Housing and Aging Society: Issues, Alternatives, and Policy, Robert J. Newcomer, M. Powell Lawton, Thomas O. Byerts, (eds.). New York, NY: Van Nostrand Reinhold Company, 1986.

This book was developed to communicate information about important housing issues across the health, housing, and human service professions. One purpose was to raise the awareness of specialists in the housing field about the changing health and social service milieu. Consequences this change will have across a range of housing types were discussed.

Housing the Aged: Design Directives and Policy Considerations, Victor Regner and Jon Pynoos (eds.). New York, NY: Elsevier Science Publishing Company, Inc., 1987.

This book was designed for architects,planners, developers, and other decisionmakers who are involved in the design and construction of housing for older people. The housing types discussed cover a broad spectrum, from individual dwelling units to institutions. This book is organized into three sections: planned housing that primarily serves the healthy, active elderly; supportive housing that serves moderately-impaired older persons; and housing environments for frail or handicapped older persons.

Policy and a Place to Live, W. Mangum, H. Briggs, and L. Mullins (eds.). Tampa, FL: International Exchange Center on Gerontology, 1983.

This book provides information on current and future housing policy. Public housing is also covered.

A Consumers Guide to Accessory Apartments. Washington, DC: American Association of Retired Persons, 1987.

This is one of a series of booklets prepared as a resource for AARP's Consumer Housing Information Service for Seniors (CHISS). It provides an overview of accessory apartments and identifies types of local government agencies and community groups that offer additional assistance.

A Consumers Guide to Home Equity Conversion: Home-Made Money, Ken Scholen. Washington, DC: American Association of Retired Persons, 1987.

In recent years, a number of experiments have taken place to make it possible for retirees to use the equity in their homes to supplement fixed incomes. Home equity conversion is described in the guide.

A Consumer's Guide to Homesharing, Washington,DC: American Association of Retired Persons and National Shared Housing Resource Center, 1987.

AARP'S Consumer Housing Information Service for Seniors (CHISS) book defines homesharing and provides the reader with options to consider when making decisions about homesharing. The author discusses what is required in order for homesharing to work. Two self-questionnaires are included for those considering sharing homes or apartments. Guidelines for a lease in a home sharing arrangement are provided.

The Doable Renewable Home: Making Your Home Fit Your Needs, John P.S. Salmen. Washington, D.C.: American Association of Retired Persons, 1988.

This consumer affairs publication provides information on how to make the home more liveable when limitations in movement, strength, dexterity, eyesight or hearing become a reality.

Housing Options for Older Americans, Linda Hubbard and Tom Beck. Washington, DC: American Association of Retired Persons, 1984.

Research indicates that older people change their living arrangements only when their needs change, and that as long as they are able, they prefer to make adjustments in the home they already occupy. This book is for those who want to remain in their own homes and also for those who are thinking about moving. It explains some housing and living arrangements that seniors may want to consider. Many of the ideas and alternatives are new and some are still in the development phase.

Living Arrangements in Later Life, Billie H. Frazier. The University of Maryland Cooperative Extension Service Bulletin 327, 1988-89.

Contents of this bulletin include: "Making the Decision," "Maintaining Older People in The Homes," "When Your Relative Refuses Help," "Group Living Arrangements," "Selected Group Housing," "Multi-Family Sheltered Housing," "Group Sheltered Housing," and "Living with Relatives."

A Practical Guide to Independent Living for Older People, Alice H.Phillips and Caryl K. Roman.Seattle, WA: Pacific Search Press, 1984.

This book is designed to encourage older people to maintain and enhance their independence. The emphasis is on the quality of an older person's daily life and the steps that can be taken to make life easier, safer, healthier, and more interesting. Another focus is on services and support for older people who wish to remain active. The book contains practical advice and suggests a few resources to continue long successful lives.

Rental Housing, Washington, DC: American Association of Retired Persons, 1987.

AARP's Consumer Housing Information Service for Seniors (CHISS) publication presents advantages and disadvantages of renting. Points to consider in the selection of a rental unit, rent subsidies, the lease, discrimination in housing, rights and duties of landlords and tenants, and housing disputes also are discussed.

The Risks, Pitfalls and Advantages of Home Equity Loans: Borrowing Against Your Home, Robert J. Hobbs. Washington, DC: American Association of Retired Persons, 1988.

Older homeowners considering a home loan face complex choices which can involve a substantial portion of their income for many years. This guide outlines some of the various home loan options, including their costs, disadvantages, and advantages. It also provides charts to assist with calculations.

Safety for Older Consumers: Home Safety Checklist. Washington, DC: U.S. Consumer Product Safety Commission, 1986.

This practical checklist is to be used to identify possible safety problems which may be present in the home.

Where Can Mom Live? A Family Guide to Living Arrangements for Elderly Parents, Vivian F. Carlin and Ruth Mansberg. Lexington, Mass: D.C. Heath and Company, Lexington Books, 1987.

This book is for those who have aging relatives and are searching for solutions to housing problems. The following topics are included: group shared homes, life-care and other congregate communities, home sharing, accessory apartments and elder cottages, how to keep a house, comparisons of living arrangements, guidelines for helping parents make housing decisions, and an overview of statistics about the older generation.

Your Home, Your Choice: A Workbook for Older People and Their Families. American Association of Retired Persons in Cooperation with the Federal Trade Commission. Washington, D.C., 1985.

This practical workbook provides checklists and information about staying at home, changing housing arrangements, and supportive housing.

CONTACT FOR ASSISTANCE

County Cooperative Extension Service (under county government in telephone directory)

County, area, or state agency on aging

Local library

National Council on the Aging, Inc.
600 Maryland Avenue, SW
West Wing 100
Washington, D.C. 20024
(202) 479-1200

American Association of Retired Persons
1909 K Street, NW
Washington, D.C. 20049
(202) 872-4700

American Society on Aging
833 Market Street
Suite 512
San Francisco, CA 94103
(415) 543-2617

This PATHFINDER resulted from the author's research at the National Agricultural Library during the summer and fall of 1989. Using database searches of AGRICOLA, Psycinfo, Social Scisearch, ERIC, Ageline, Family Resources and Dissertation Abstracts International, relevant references were reviewed and annotated. It is authored by:

** Billie H. Frazier, Ph.D., Certified Family Life Educator, Associate Professor, Human Development Specialist, The University of Maryland Cooperative Extension Service, College Park, Maryland

Reviewers: Dr. Leo L. Cram, Director, Missouri Gerontology Institute, University of Missouri, Columbia, Missouri, and Dr. Barbara A. Gunn, Professor, Extension Specialist, Adult Development and Aging, The University of Nevada-Reno, Reno, Nevada

Technical Support: Kathleen C. Hayes and Sandra L. Facinoli Technical Information Specialists, National Agricultural Library, United States Department of Agriculture

For questions or comments: contact Billie H. Frazier, Room 2309, Computer and Space Sciences Building, The University of Maryland, College Park, Maryland 20742-2451, Telephone: (301) 454-3602.

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